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# Soul searching: Public relations, reputation and social marketing in an age of interdisciplinarity

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## ABSTRACT

Positioning the present as an age of interdisciplinarity, we explore the potential for development through selected intersections, primarily with PR and social marketing. We situate this exploration in the further context of the contemporaneous search for what some management theorists have called soul. In the process, as well as contributing to the PR and social marketing bodies of knowledge, we seek to clarify academic deliberations about selecting productive and prosocial interdisciplinary intersections. To begin to illustrate parallel process in practice, we embed practitioner perspectives in an account of social marketing in Aotearoa New Zealand<sup>1</sup>. Our intent is to look for ways in which both scholars and practitioners could get better at it. We conclude by suggesting that intersecting with social marketing can also help PR tackle three major and continuing issues: methods, outcome evaluations, and reputation.

## 1. Introduction: an age of interdisciplinarity and a search for soul

Since the 1990s, proponents of interdisciplinarity (Fuller, 1993; Kockelmans, 1998; Hansson, 1999; Payne, 1999) have argued that interdisciplinarity offers a conceptual and practical means of answering questions and providing solutions to problems that cannot be successfully addressed by single discipline approaches. Klein (1996) allows that interdisciplinarity can be driven either by the aim of unifying knowledge or by social intent and Aram (2004) argues that it is the scholars who determine the focus. Along those lines, as self-confessed interdisciplinary ideologues themselves, Fuller (1993) “believe that, unchecked, academic disciplines follow trajectories that increasingly isolate themselves from the most interesting intellectual and social issues of our time” (p. 29).

Although, Frodeman (2017) later claimed it to have “been 25 years in the making” (p. vii), he became lead editor of the groundbreaking first edition of *The Oxford Handbook of Interdisciplinarity* (Frodeman et al., 2010). Already, Braun and Schubert’s (2003) article “A Quantitative View on the Coming of Age of Interdisciplinarity in the Sciences 1989–1999” published statistics from the last decade of the 20th century that underpinned this decade as part of a burgeoning of interdisciplinarity, on the cusp of a full age of interdisciplinarity in this century.

In a different field but engaging with the similar *Zeitgeist* of intellectual and social issues, Adler and Jermier’s (2005) seminal *Academy of Management Journal Editors’ Forum* called for “Developing a Field with More Soul” (p. 941). Although the term may be conceptually vague, PR has long had a practical stake in developing soul. In Cutlip’s (1994) “Prologue,” he acknowledged that his

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<sup>1</sup> We use Aotearoa New Zealand in recognition of the two groups that call these islands home: tangata whenua – the indigenous peoples, commonly referred to as Māori – and tangata tiriti – the peoples for whom Te Tiriti o Waitangi (New Zealand’s founding document, the Treaty of Waitangi) established their right to live here. We do this to recognise the two cultures that formed this nation and the challenges and strengths this has created. Any reference to Aotearoa or New Zealand should be seen as a recognition of both.

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monumental history of PR had its genesis in drawing attention to “the good for society that can be accomplished through ethical, effective public relations” (p. ix), and to illustrate his belief that “only through the expertise of public relations can causes, industries, individuals, and institutions make their voice heard in the public forum” (p. ix).

Marchand’s (1998) history similarly recounts how late 19th and early 20th century PR contributed to improving “the plight of the soulless corporation” (p. 7). His book title calls this improvement process “*Creating the Corporate Soul: The Rise of Public Relations and Corporate Imagery in American Big Business*” (Marchand, 1998) and he charts how corporations employed PR to counteract public perceptions that the “big business corporation, as a rising chorus of American voices chanted insistently from the 1890s onward, had no soul” (p. 7).

Business in general – see, for example, Rudebeck (2019) and Rubin and Carmichael (2018) – still seeks public recognition of their souls. PR practice in particular – often by advocating through academic pathways, such as Bernays’ insertion of PR in higher education institutes and through his various books (1952, Bernays, 1923; 1955) – has undertaken the same search. Recent signs of the quest can be seen in how Capozzi and Spector’s (2016) advocacy in *Public Relations for the Public Good* sets out to illustrate “How PR has shaped America’s social movements” and adds to what they see as the growing scholarship “around the influence of public relations on world history” (p. xi).

In this more fully-fledged age of interdisciplinarity, academic fields increasingly aspire to “soul” scholarship to alleviate “a world of immense and unnecessary suffering and destruction” (Adler & Jermier, 2005, p. 941). In other words, reputational capital is at stake in educational disciplines, including PR, as well as in the marketplace and society. Moreover, academics often seek to fuse business and disciplinary claims to soul. Kempster et al. (2019) *Good Dividends: Responsible Leadership of Business Purpose* uses the “dividends” language of financial returns and co-opts the common PR term “stakeholders” to support such contemporary assertions as “Business has the very real potential to be the greatest mechanism on the planet to enhance humanity, if it can do this profitably and generate dividends for all its stakeholders” (p. 3). In PR, the movement with most traction is Heath’s (2013) Fully Functioning Society Theory (FFST), which “reasons that public relations theory is best when it challenges and helps organizations be effective not only by what they do for themselves but also with the communities where they operate and on whose resources they depend” (p. 368). Instead of arguing that PR is entitled to social status, FFST offers a form of academic activism suggesting what PR might do to earn the right to public support.

However, critical PR scholars frequently criticize PR as being “a strategic tool for corporates and governments to realize self-interest and advantage in competitive environments” (Edwards, 2015, p. 60) because it “tends to be used most widely by already dominant groups in society, further increasing their power and distorting debates in favour of their interests” (p. 63). Unlike social marketing, which works mainly on behalf of governments and nonprofit organizations to promote a common good and a positive behaviour change, PR, like marketing tends to also serve the business sector where priorities often align with the corporate financial bottom line.

The content of much existing non-corporate PR work (enables it to fall under Adler and Jermier’s (2005) defining description of aspiring to alleviate “a world of immense and unnecessary suffering and destruction” (p. 941). PR practitioner activity in nonprofit organizations includes: fundraising for bodies that protect human rights and help essential services (e.g., Red Cross, UNICEF); manage relationships with volunteers, promote social change while serving civil rights and other progressive movements; lobbying to limit gun use and so on ([https://ssir.org/articles/entry/lobbying\\_for\\_good](https://ssir.org/articles/entry/lobbying_for_good)). Although this offers strong support for soul in PR functions, all of them might be abused in PR services to less soulful organizations. Looking to add value to FFST through interdisciplinarity, this article explores how intersections between PR and social marketing could not only do more to enact such an alleviation but could also clarify academic deliberations about selecting, or practitioner accounts of arriving at, productive interdisciplinary intersections, and how both theory and practice could get better at it.

## 2. Jurisdiction perspectives (1): Professions, promotional disciplines, and the fight for the good

Interdisciplinarity is not just a logical and innocent process of finding common ground and forging connections. It also involves territorial disputes around jobs, as well as considerations of academic, professional and social status. Writers in the PR literature (e.g., Abdullah & Threadgold; 2008; Pieczka & L’Etang, 2001; L’Etang, 2004; Toledano, 2010) follow sociologists (Abbott, 1988; Neal & Morgan, 2000) in foregrounding the role of an exclusive jurisdiction in establishing a profession. Such scholarship stems from Abbott’s (1988) analyses of how occupations gain professional status through winning demarcation disputes or what he calls “jurisdiction” in an area by “taking over” (p. 33) another profession’s tasks. The jurisdiction perspective has academic parallels that help explain the frequent disciplinary engagements of PR with marketing. McKie and Willis (2012) track recent attempts by marketers to openly subsume PR by bringing it under the jurisdiction of marketing. There are similar demarcation issues as disciplines compete for soul in terms of the good. Kotler, Hessekiel and Lee (2012) are explicit on this in their book title: *Good Works: Marketing and Corporate Initiatives That Build a Better World – and The Bottom Line*. We contend that these competitive encounters between PR and marketing have a long record partly explicable through boundary shifting linked to historical developments in marketing.

Although the story is significantly more complex and substantially larger than our account, we will, for brevity and clarity, present a simplifying narrative overview constructed through three aspects: Philip Kotler’s “broadening” of marketing, the invention and rise of the field of social marketing, and how those first two intertwine. Kotler is one of the top marketing academics in the world and a prime mover in the way that marketing has set out to bring other disciplinary areas and ideas of soul under its auspices. For this part of the article, prior to considering his foundational and continuing contributions to social marketing, we focus on Kotler’s (cited in Dibb & Carrigan, 2013) own retrospective account. Kotler (cited in Dibb & Carrigan, 2013) recalls how, initially with Sidney Levy as co-author, he set out to “broaden marketing” (Kotler & Levy, 1969, p. 1379). Together, they argued that marketing “can be applied

to. . . places (cities, regions, nations), people (celebrities or creating celebrities) and causes (eat more nutritious foods, exercise regularly)” (Kotler & Levy, 1969, p. 1379). In terms of jurisdictions, this bold bid had, and continues to have, substantial purchase. Specific examples of those particular applications in practice continue over 30–50 years later: Campelo’s (2017) *Handbook on Place Branding and Marketing*, Thompson’s (2000) *The Role of Celebrities in the Promotion of Products as a Marketing Strategy*, and Wansink’s (2005) *Marketing Nutrition: Soy, Functional Foods, Biotechnology, and Obesity*.

Despite these tangible outcomes, marketing’s jurisdiction is not exclusive to the extent that PR and other fields keep contesting the imperialism through jurisdiction capture, notably in each of the specific named areas – public diplomacy experts participate in place branding, PR professionals represent celebrities, and health promoters publicize good nutrition. Nevertheless, the outcomes of Kotler’s “broadening” project extend as far as the moon in Scott and Jurek’s (2014) *Marketing the Moon: The Selling of the Apollo Lunar Program* and his early revised definition of marketing as “serving human needs and wants sensitively” (Kotler & Levy, 1969, p. 15) continues widen marketing’s reach. The current high water mark may be in Seth Godin’s (2018) attempted colonization of social change when, in *This Is Marketing*, he asserts that: “Marketing is the act of making change happen” (p. xiv).

Kotler was also successful to an extent in persuading others in other promotional fields, including PR (Moriarty, 1994; Smith, B.G., 2012), to integrate under a broad marketing, or Integrated Marketing Communications (IMC) banner. Moriarty (1994) propounds “The benefits of integration” (p. 38) for PR and IMC and B.G. Smith (2012) proposes that PR’s contribution to IMC is the way to secure the field’s future. Outside the two fields, others simply accept the co-option of PR into marketing as in Key and Czaplewski’s (2017) nomenclature “Marketing Public Relations” (p. 328) and Padyani (2008), who, writing from the nonprofit sector, presents marketing as “an essential strategic management function” (p. 11) a definition that, without the strategic, is all too familiar to those in the PR field. Although not relevant to the interdisciplinary focus of this article, more recent incorporations of traditional PR activities by marketing range from cause-related marketing through relationship marketing to purpose branding.

On the other side, among the PR resistance to incorporation by marketing, Hutton (2001; 2010) has made significant contributions. In the *Handbook of Public Relations* (Heath, 2001), Hutton (2001) contends that the most important challenge of PR is to define the boundaries with marketing and at the end of the decade, Hutton (2010) made an even stronger call to resist marketing attempts “to include or subsume much or all of public relations” (p. 509). McKie and Willis (2012) similarly opposed marketing imperialism and forced integration (p. 851) and called for renegotiating “traditional turf wars between the two fields” (p. 846). In the age of interdisciplinarity, we suggest firstly, that mindful intersections with social marketing would be a better option. Before beginning to consider intersections, we draw attention to one striking contrast between social marketing and PR. Social marketing stands as a prosocial field taking a substantial part of its identity from opposing business or commercial marketing – as in Hastings and Domegan’s (2017) *Social Marketing: Rebels with a Cause*. In sharp contrast, although corporate PR is a category of PR, social PR is not conceptualized as a common opposition force, especially in the key genre of PR textbooks, even though activist PR, community relations and nonprofit PR all usually earn an individual subsection in the same textbooks.

## 2. Jurisdiction perspectives (2): is social marketing pure soul?

Kotler’s “broadening” project helped marketing expand but he seems to have almost simultaneously attempted to distinguish a more soulful section within the main field. Certainly, he is acknowledged as being the first to use the term social marketing in the landmark paper *Social Marketing: An Approach to Planned Social Change* (Kotler & Zaltman, 1971), although, as in PR history, scholars trace the roots of much of its practice much further back. Donovan and Henley (2003) link social marketing to national propaganda efforts, Lee and Kotler (2011) connect it to the work of the suffragettes and Chandy et al. (1965) relate it to family planning in India.

Almost half a century after the term was coined, social marketing is an accepted means of achieving positive individual and societal change through the use of marketing principles and techniques (Dibb & Carrigan, 2013; Donovan & Henley, 2003; Lefebvre, 2013). The practice has been used to great success in different arenas across the globe, particularly in the health arena (Cheng et al., 2011), and is now recognized as part of a solution to wicked social problems (Dibb & Carrigan, 2013) and operates at both a population (Lefebvre, 2011, 2013) and strategic level (French, 2015). Social marketing has roots in history but has continued to expand in range, in geographical reach, and in academic methods since 1971.

Most noticeably, social marketing, albeit unevenly, has continued to expand in the academic arena too. Dibb and Carrigan’s (2013) editorial in their special issue of the prestigious *European Journal of Marketing* on “Social Marketing Transformed” identifies the following “clear markers. . . as evidence of the growing status of the field” (p. 1377):

the launch in 2011 of the *Journal of Social Marketing* from the Emerald stable; the thriving World Social Marketing Conference; the establishment of several social marketing research centres, including the Institute for Social Marketing at the University of Stirling, ISM-Open at the Open University, and the Bristol Social Marketing Centre at the University of West England; the founding of the National Social Marketing Centre; the emergence of a growing number of university courses and training programmes in social marketing. (p. 1377)

Nevertheless, social marketing remains a misunderstood, or what we would more accurately describe as a contested, term. While many identify lack of definitional clarity as a failure of logic, we see differing definitions more as signs of jurisdictional competitions. In his attempt to update definitions based on more recent definitions of marketing in the USA and UK, Dann (2010), for example, identifies more than 40 definitions of social marketing. However, his revised definition of “the adaptation and adoption of commercial marketing activities, institutions and processes as a means to induce behavioral change in a targeted audience on a temporary or permanent basis to achieve a social goal” (Dann, 2010, p. 151), fails to account for social marketing aimed at social structures or political decision-makers. His definition thus ignores the focus of much contemporary social marketing in addition to missing an

obvious intersection with PR. On definitional points, we take our bearings from Williams's (1983) insight that differing meanings on conceptually and politically contested areas are "inextricably bound up with the problems" they are "used to discuss" (p. 15). In other words, since "meanings are part of every problem and every attempted solution" (Hodge, 2017, p. vi), marketers and social marketers frequently disagree on definitions not over matters of logic but because of significant differences about how their contemporary practices should be enacted, thought about, inhabited, and whom they should seek to serve. Or, to follow Hastings (2007), in arguing for social marketing to use marketing methods, memorable title: *Why Should the Devil Have All the Best Tunes*.

It needs to be borne in mind that, for scholars, achieving a consensus on a definition for a discipline can be political. The *International Social Marketing Association*, the *European Social Marketing Association* and the *Australian Association of Social Marketing* canvas of their members helped develop the following definition that embraces marketing concepts and other social change techniques:

Social Marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater good. Social Marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable. (Morgan, 2017)

At least, this definition recognizes that social marketers draw on a wide range of disciplines and tools to benefit individuals and societies. More importantly, it situates social marketing at the intersection of multiple disciplines. Recently, Kotler, with others, tried to expand using a different discipline marker "If social marketing is to be a discipline, it needs a process. Nancy Lee and I . . . worked out a 10-step process. If political marketing is to be a discipline, it too must work out a ten-step process" (Smith, B., 2012, p. 6). This may be a good tactic to guide readers and students to the sixth and latest edition of the Lee and Kotler (2019) textbook *Social Marketing: Behavior Change for Social Good* but publication success in that market does not cement Kotler's assertion of the need for a set process as a discipline marker. This is because a set process alone does not necessarily win the assent of interdisciplinary scholars or other social marketers, particularly for a magpie discipline such as social marketing. Moreover, the separation of process from purpose allows social marketing to be "an amoral technology that can be used for good or ill" (Hastings & Domegan, 2018, p. xxxiv).

## 2. Jurisdiction perspectives (3): the evolution of social marketing in Aotearoa New Zealand

On the ground, from the perspective of practitioners, the growth of social marketing appears even less clear cut. To illustrate this, we consider social marketing developments in New Zealand from its emergence in the 1990s. During this decade, agencies such as the Land Transport Safety Authority (LTSA), the Alcohol Advisory Council (ALAC) and the Health Sponsorship Council (HSC) were exploring the use of mass media alongside environmental factors and policy interventions to change behaviors. The conscious adoption of social marketing in New Zealand can be dated specifically to 1999 when the HSC began to describe itself as "a team of Social Marketers who promote health messages" (cited in McDermott Miller, 2001, p. 19). This was also the year in which information on social marketing first appeared on the HSC website. From its emergence, the New Zealand version of social marketing appears as the child of several parents rather than simply the offspring of the application of marketing techniques within the social change space. In New Zealand's first published social marketing resource, the HSC (2001) defined social marketing as "a social change tool that aims to increase the acceptability of specific social behaviours and practices. Social marketing involves communicating social messages to an audience in a credible way with the aim of influencing their thinking and actions" (p. 2).

In the HSC's (2001) initial publication, partnerships, which appear to include audience research, policy, health promotion, and other activities, were positioned as complementary to social marketing activities. However, within three years, the HSC's (2004) *Social Marketing Downunder* website has evolved this thinking with social marketing serving as the inclusive term for an increasingly wide-ranging area of activities. HSC's (2004) definition expanded to include "the physical, social and economic environment in which they live" (HSC, 2004) rather than just focusing on individual behavior change. Aotearoa New Zealand may have come to the social marketing party late but like other "parents" of the discipline, practitioner interventions, notably from PR and public health, influenced its constituent parts and practices. The leaders of this "new" practice would shape its emergence over the next decade. Within the private sector, Tracey Bridges, of the PR agency Porter Novelli, and Nick Farland, of advertising agency The Bridge, became advocates and published what became "the book": *Social Marketing: Behaviour change marketing in New Zealand* (Bridges & Farland, 2003). Visits from Porter Novelli's Worldwide Director of Social Marketing Edward Maibach and the delivery of HSC social marketing workshops by PR practitioner Hoani Lambert further compounded the influence of PR on social marketing.

Nor was it just a matter of promulgation, the emerging field was absorbing practitioners to deliver it and, in a small nation, these, of necessity, came mainly from the existing workforce. As PR practitioners were already involved in delivering social campaigns, engaging with decision-makers and understanding the various groups that needed to be reached, they were the logical choice. Public health practitioners would also play a part, but the people with experience of national campaigns and existing media relations were mainly drawn from PR. Thus, these two groups would shape the development of a New Zealand-style social marketing developing an intersectional practice that is today recognized by those in the field as the golden age of social marketing in Aotearoa.

Coombs and Holladay (2010) suggest PR is about advocacy, power and using influence within a web of relationships. That foundation would be a natural starting point for PR practitioners moving into social marketing and using their relationships to build partnerships, and to advocate for change that would deliver to the goals of the program. Indeed, advocacy, along with a focus on opinion leaders and intercessory publics, has sat at the center of PR for much of the discipline's history (Smith & Smith, 2013). Accordingly, New Zealand PR provided a quite different starting point for developing social marketing by looking from a strategic vantage point and by considering the many influences that can be brought to bear in forging a contemporary social marketing fit for

contemporary conditions in a different nation geographically distant from the UK and the US.

As noted above, New Zealand's only dedicated social marketing agency, the HSC, had adopted a definition of social marketing that acknowledged the physical, social and economic environments in which people live (HSC, 2004). Engaging with key aspects of soul, the HSC described social marketing as the use of marketing principles and techniques to benefit individuals and society, helping create environments that supported behavior change. It identified key features of social marketing as a consumer focus, voluntary behavior change and research-led activities that targeted different market segments and used the marketing mix.

Accordingly, at the conscious introduction of social marketing in New Zealand, and in the first social marketing publication (HSC, 2001), the marketing mix followed the traditional 4 Ps of product marketing: Product, Price, Place and Promotion. New Zealand practitioners, however, situated the imported mix alongside the Ps of partnerships and policy as well as other activities. The later HSC (2004) delineation of the marketing mix began to deviate most visibly from "pure" marketing thinking to social marketing crossed with PR practices by revising their mix with the addition of a further two Ps: Policy and Partners. As these are such core concepts in PR, it follows logically that these additional areas result from the influence of PR practitioners and PR thinking (with some input from the public health sector).

This acknowledgement of the place of social marketing in creating healthy public policy was ground-breaking at the time. It predated the much-vaunted Andreasen (2005) proposal of the three levels of marketing practice that were taken up by Kotler and have since come to occupy almost iconic stature (French & Gordon, 2015, pp. 28–29). Indeed, when Andreasen presented his thinking at a World Global Marketing Conference, New Zealand's leading social marketer, Tracey Bridges, recognized that this was the social marketing thinkers finally incorporating PR within their approach. The focus on different audiences, accompanied by the adoption of language and techniques from PR, which was present in New Zealand social marketing almost from the outset, did not enter the global arena until around 2011. The importance of PR in effective social marketing was further boosted by Kotler's identification of the third key stage of social marketing focused on organizations and institutions, which "play an important role in supporting an undesirable or that can play some positive role in supporting the desirable behaviour" (Dibb & Carrigan, 2013, p. 1381).

Both public health and PR focus strongly on working with organizations, communities and other stakeholders. This comes through in the final P for Partners, although that may partly be a result of the disparate nature of the New Zealand health system. The HSC and other agencies needed to work with other organizations to achieve goals, extend budgets and deliver effectively. While the use of the 6 Ps in social marketing is not unique to Aotearoa, its early national adoption links to the influence of PR in establishing the discipline in New Zealand.

The task of separating out the role of public relations in past social marketing programs, however, is difficult. For instance, in their report on NZ youth-focused social marketing, Thornley and Marsh (2010) largely describe the mass media advertising of the campaigns they consider. Within social marketing, promotion is the last and most visible element of the marketing mix. Many New Zealand social marketing practitioners position this focus on mass media advertising as social advertising not social marketing, which is understandable since grasping the elements involved in a social marketing program from the outside is difficult and the most visible elements are often mass media advertising. We suggest that without an understanding of how the other elements – including PR activities – of the program have been used, we cannot fully understand if social marketing is happening and if it is effective. Indeed, Lee and Kotler (2011) argue that the mix is most important and without consideration of all elements of that mix, many campaigns fail. However, with the disestablishment of the HSC in 2012, their thought leadership in New Zealand social marketing disappeared too. There was no central hub for social marketing and specific skills, tacit knowledge and team experience appears to have been lost with it.

The disestablishment of the HSC followed a change in government in New Zealand in 2008 but the political aspects are a whole other dimension that require different research. At this stage it is enough to say that the election of a new government in 2017 enabled social marketing to re-emerge. Unfortunately, in the re-emergence, the 4 Ps of the marketing mix have again come to dominate social marketing, and the world leading practices of the early 2000s have largely been lost. However, as the limitations of the marketing mix also resurface through social marketing's increased focus on the consumer and upstream approaches, the time may be right to revisit the public relations-inspired mix of New Zealand's early social marketing. Although further scrutiny is needed as we move further into Kotler's fourth key stage of social marketing, which focuses on social change and individualized communication channels, the skills and focus of the PR discipline can continue to play an important role in future social marketing. Indeed, it is over five years since Matthew (2012) noted that commercial marketing had long since moved away from this simplistic [4 Ps] approach and "a tendency to adopt outdated, irrelevant theories. . . does not help social marketing establish itself as an important and unique discipline" (p. 98). The alignment of all these elements make this a propitious time to bring a strategic PR focus into social marketing in New Zealand. So, despite the messy and uneven development of social marketing in practice, the New Zealand evolution narrative tends to support scholarly identifications of the present as a good time for considered intersections between PR and social marketing.

### 3. Developments in social marketing

As with commercial marketing, social marketing needs to move away from the idea of advertising-centered campaigns and towards a focus on building relationships with a PR approach. This focus becomes even more important in a time when social media are so central. The move offers opportunities for social marketing to learn from the core skills of PR but social marketing seems to have missed the advances beyond the 4 Ps despite Hastings (2007) reminder that "the behaviours social marketers want to change have multiple influencers" (p. 131). The continued use of a 4 P based marketing mix developed before social marketing emerged, is thus increasingly problematic. This will come under further scrutiny in Kotler's fourth key stage of social marketing with its focus on social change and individualized communication channels.

French (2017b) argues that definitions of social marketing have been used to establish criteria for social marketing. However, these criteria are a mix of principles, concepts and techniques. He suggests that understanding the essential nature of social marketing requires a hierarchical relationship between principles, concepts and techniques. French (2017b) suggests a single core social marketing principle: “Social value creation through the exchange of social offerings (ideas, products, service, experience, environments, systems)” (p. 21). This fits well with Adler and Jermier’s (2005) soul scholarship as well as providing space for various disciplines to come together under the banner of social marketing. Under this core principle, French (2017b) suggests four social marketing concepts: Social behavioral influence; Citizen/civic society focus; Social offerings; and Relationship building. This revised thinking also challenges the traditional view of public relations within the social marketing academy. Public relations has been seen as a promotion option (Cheng et al., 2011; Lee & Kotler, 2011) rather than a strategic and relationship dimension. This is a misunderstanding that matters. It is time for social marketers to understand the strengths and purpose of PR and for PR practitioners to understand the strengths and purpose of social marketing. Indeed, the writers of textbooks within the two disciplines demonstrate little understanding of the core principles and concepts offered by the other. The four concepts in French’s (2017a) collection provide space for marketing, public relations and other social change practices to inform strategy and thus the next step in the hierarchy – social marketing technique.

Underneath the core principle and four concepts, French (2017b) positions four core social marketing techniques: “Systemic and systematic planning and evaluation and integrated intervention mix”; “Competition analysis and action”; “Insight-driven segmentation”; and “Co-creation through social markets” (p. 23). Moving away from the 4P driven marketing mix in this way, French (2017b) provides space for marketers and PR practitioners to come together in a combined social marketing with more soul. The strengths of marketing in its citizen focused, data-driven focus on exchange complement PR’s focus on partnership, engagement and the big picture.

#### 4. New Zealand’s influence on social marketing

Our journey’s focus on the introduction of social marketing in Aotearoa suggested that the early New Zealand experiences offered a broader focus than practice elsewhere. French’s (2017b) hierarchical model of social marketing resonates effectively with the strengths inherent in those early approaches. The influence of PR and health promotion on social marketing has effectively produced a discipline that can – if the lessons are shared – learn from all comers. However, New Zealand has one unique contribution to bring to social marketing and it is informed by the nation’s founding document, Te Tiriti o Waitangi<sup>2</sup> (1840). Te Tiriti, signed between the Crown and some hapū (tribal) leaders in 1840, consists of three articles focused on tino rangatiratanga (self-determination), kawanatanga (governance) and oritetanga (equity). Within New Zealand government bodies, these articles are often reduced to three treaty principles: partnership, participation and protection. Social marketing in New Zealand was thus launched in an environment in which agencies were required to consider:

- Partnership: working with Māori to develop approaches to improve Māori health [or other aspiration, such as, educational achievement, economic participation...]
- Participation: involving Māori at every level of planning and delivery
- Protection: working to ensure Māori have the same level of health [or other outcome] as non-Māori (Ministry of Health, 2014).

The articles of Te Tiriti and the associated principles place a social justice agenda on state-funded social marketing. The rights and needs of indigenous (and other groups) need to be addressed not only in the final delivery of the program but also through active partnership and ongoing participation. Thus, relationship building, a key component of PR practice is embedded within a New Zealand approach to social marketing.

Judging the success of social marketing within this framework also demands that outcomes are delivered that level the playing field – that lift the status of disadvantaged groups. As an example, New Zealand has a history of poorer health outcomes for Māori (Ministry of Health, 2015), making hauora Māori (Māori wellbeing) a particular issue when health outcomes in New Zealand are viewed through the lenses of Te Tiriti o Waitangi. This means that social marketing has adopted a focus on changing environments as well as on individual behavior change, and positions Māori as active partners in developing programs that impact them. The Ministry of Health has illustrated how Te Tiriti translates into health promotion practice and the same can be assumed of social marketing. That is to say that: Māori health has the highest priority and Māori concepts of health are recognized in program planning, Māori have control over their own health and access to resources, and Māori are empowered to fully participate at every level, and programs are designed to be responsive to Māori needs (Ministry of Health, 2002).

##### 4.1. Where to from here?

Public relations and social marketing already intersect. Yet there is still much for the two disciplines to learn from one another – both strategically and operationally. Together they offer an opportunity to deliver programs that benefit individuals and societies. However, achieving practice with soul will require change, preparation and thought. A good starting point would be when

<sup>2</sup> We use Te Tiriti o Waitangi or Te Tiriti when referring to the Treaty of Waitangi to acknowledge the original version in te reo Māori rather than the English translation made at the time. Subsequent translations have highlighted key differences between the two 1840 documents

considering how we prepare practitioners and ensuring appropriate opportunities are available to them. It should continue by also including how we plan, deliver and evaluate programs, and how we build the reputations of both disciplines collectively.

#### 4.2. Training and employment for practitioners

How do we prepare the workforce? In small countries, like New Zealand, social marketing and PR teams are often small. Indeed, many programs are overseen by a single member of staff who is responsible for a range of PR functions as well as the delivery of social marketing campaigns and/or programs. These staff members therefore need to be skilled in both traditional social marketing and PR and yet the opportunity to develop the two skill sets are lacking in many of our education programs. Coordination will be required so that, for example, universities engage with government and non-government agencies to understand the evolving needs of the sector, particularly as evidence from other parts of the world suggests social marketing and other citizen-focused behavior change programs are becoming embedded within our societies (French & Gordon, 2015).

For PR practice, this means evolving beyond a focus on issue awareness or size of media coverage and moving towards delivering measurable behavioral outcomes in PR itself and within broader social marketing programs. It also means developing practitioners with an understanding of behavior and behavior change, as well as integrating social marketing theory and practice into PR education programs. Looking at the transfer from the other side, PR theory and practice is needed within social marketing programs: social marketing practitioners need to understand relationships and their power, how to influence at a political level and how to engage audiences through PR tools. In addition to making themselves more marketable, practitioners with the skills of marketing and PR will be better prepared to engage on social issues and develop and implement programs that influence at every level. This will ultimately benefit society.

#### 4.3. Evaluating our practice

In the 1990s, social marketing moved from a focus on changing ideas to changing behavior (Andreasen, 2006; Dibb & Carrigan, 2013). This, we argue, remains the most important lesson that social marketing brings to PR. It is not enough to communicate messages, get media coverage and influence ideas, we must seek to change behavior. In addition, that change must be measurable if we are to be judged successful. In New Zealand for example, the *Evaluation Standards for New Zealand* (Social Policy Evaluation & Research Unit, 2015) describe evaluation as a range of activities to determine the value, quality and importance of something. Specifically within social marketing, evaluation “assesses whether a programme has been implemented according to plan and the degree to which it has met its goals and objectives” (Stead & McDermott, 2011, p. 193). Evaluation provides an opportunity for funders to be assured of credibility, improvements to be made throughout a program, decisions to be made around adjustments to the techniques used, the actual outcomes to be assessed and future interventions are able to learn from past programs (Stead & McDermott, 2011) and in social marketing terms to improve some aspect of the real world.

As Andreasen (2006) argues, social marketing has a role in agenda setting in public, political and media arenas. This cannot be done through a downstream focus on individual behavior change. The advocacy and engagement skills of PR practitioners have a very real role in effective and comprehensive social marketing. This too needs to be measured, how is social marketing changing the opinions and behaviors of politicians, decision-makers, journalists and the wider public? Andreasen (2006) further argues the need for a dual focus in social marketing, with upstream approaches focused on decision-makers and leaders (i.e., a PR approach, and downstream approaches focusing on individual behavior change. He notes that a focus on individual behavior change alone can stigmatize the target audience in a traditional social marketing approach. Indeed, he states that “it is unfair to expect the individual to act, even if he or she is motivated, because *barriers* in the environment external to the individual make it difficult or impossible to act” (Andreasen, 2006, p. 74).

Evaluating the success of social marketing programs, and the impact of PR on them, means thinking about evaluation and making it an integral part of any program. As Crosier and McVey (2017) note, “the lack of good-quality evidence is a persistent theme that informs debates about evaluation of social interventions, including social marketing and behaviour change programmes” (p. 49). Any summative evaluation needs to focus on not just the target audience but also the other groups impacted by the program. In contrast to many current evaluations, the outcomes must be distinguished from outputs – practitioners should focus on demonstrated behavior change not number of people reached nor the visibility of events held (see French, 2017a). To take advantage of French’s (2017b) hierarchical model of social marketing: we need to consider how the program has increased social value or decreased social problems, and to look at the techniques used and their impact – particularly in checking how behavioral objectives have been met. While Lee and Kotler (2011) note that both behavioral and awareness goals may be appropriate within a social marketing plan, Andreasen (2006) rightly observes that these secondary/awareness goals alone should not be used as a measure of success. Social marketing programs exist to influence behavior.

Returning to the lessons of New Zealand and the lens of Te Tiriti o Waitangi (1840), there is more to a successful program than the raw numbers of behavior change. The principles of partnership, participation and protection must also be considered. How have Māori and other at-risk groups been partners in the program; how have they participated in the planning, delivery and evaluation; and what kind of equity has been achieved? For example, the two disciplines’ claims of success in introducing smoking reduction to women features in both the marketing and PR literature and yet scant attention has been paid to Māori women. New Zealand celebrates success in reducing tobacco smoking and a target of fewer than 5 percent of New Zealanders smoking by 2025 has been set (Health Promotion Agency, 2018). Can twenty years of tobacco-focused social marketing lay claim to success? As well as society as a whole becoming healthier, individual lives have been improved through going smokefree, and smokefree homes, clubs and workplace

initiatives have created healthier environments, in addition to relevant policy changes (plain packaging, pack size, excise tax, etc).

Despite these markers of success, clear limitations exist in terms of failing to include the treaty principles and to keep a focus on equity and social justice. Māori women's smoking rates are currently around 34 percent (Broughton, 2018), much higher than the general population rate of 13 percent. In measuring success, we must take in many facets, and cannot afford to ignore measures of failure when lives are at risk. Accordingly, evaluation needs to consider whether a program has: involved appropriate partnerships and participation; raised social value or decreased social problems; impacted positively on the target groups (including changing their behavior); and decreased inequities for those most at risk.

#### 4.4. *The intersection revisited: Social marketing, three major issues in PR and pure soul*

Three major and ongoing issues for PR are: employment for practitioners, evaluating outcomes and social reputation. In discussing the intersection, McKie and Toledano (2008) proposed that: "if social marketing is to avoid a marginal position on the fringe of marketing in education, then sharing the PR educational dowry may offer an attractive option" (p. 324). Although, from the perspective of 2019, social marketing has, as charted above, established a distinctive niche of its own, it has still to deal with familiar marketing overtures in the familiar imperial tone: "Social marketing should rightly be considered part of the marketing mainstream. Rather than debating whether the field is actually part of marketing, academics need to accept this fact and move forward to handle the challenges it brings" (Dibb & Carrigan, 2013, p. 1376). There are two further prominent social marketing assets for PR. The first arose: "because the need to address major social problems through behavioral change is growing, there will be increased graduate employment opportunities to do such worthwhile work" (McKie & Toledano, 2008, p. 324). This remains a vital issue for jobs for practitioners as well as for answering calls for change with impact and robust evaluation outcomes.

Social marketing's final asset is its association with soul in action and soul scholarship. This varies from Basil's (2007) view that "As both a practice and a field of academic study, social marketing is a process tool" (p. xxi) to Hastings' (cited in Dibb & Carrigan, 2013) explicit call to social marketers to engage with "two major threats – corporate power and anthropogenic climate change" and to pick up "one dauntingly ambitious opportunity: empowered social change" (p. 1388). The promise of the latter kind of environmental and social engagement offers possible pathways to retrieving PR's reputation from being one of the "dark arts" (Burt, 2012, p. 202). Two further reflections arise from revisiting the intersection. The first is the significant but rarely considered difference that PR has no "social PR" equivalent to social marketing and the second looks at recent social marketing scholarship to suggest how lack of knowledge of may be holding back not just PR's capacity for soul in content but can dispel some of the vagueness surrounding what is involved in satisfying the search for soul in general.

For the first, many notable social marketers (e.g., Hastings, 2012) continue to struggle to avoid being integrated into commercial marketing. In contrast in PR, despite the substantial growth in critical PR (L'Etang et al., 2015), no one has theorized the large sector of the field that, with a focus on campaigns, might be classified as non-business, non-corporate PR. It could be captured under a common umbrella identity of non-commercial, or social PR. Many of its campaigns – especially by community PR and non-profit PR practitioners – are strongly prosocial and pro-environment but are not integrated into a common social PR movement with an equivalent enactment agenda to social marketing. For the second, we consider relatively recent, mature and thorough social marketing scholarship on soul that doesn't just involve methods and outcomes but goes beyond them in striving to build the foundations for a broad theoretical and practical consensus.

This involves these scholars in asking hard questions and probing more deeply into how much social marketing is pure soul. For example, while social marketers may consistently mean well – and clearly do more for public health with smoking programs than commercial marketers who promote tobacco products – Holden and Cox (2011) still ask if there is anything about social marketing "that makes it inherently ethical?" (p. 59). The obvious answer is usually the content and different ends of their endeavors but, for them, "what constitutes the social good" (p. 59) nevertheless remains "difficult to determine and. . . [is] often contested" (p. 59). Taking immunization as a case, Holden and Cox (2011) argue that the problem:

is that what is good for the individual does not necessarily align with what is good for the community. Individual preferences may be subjective but are nonetheless deemed important from an ethical point of view. It is noteworthy and ironic perhaps that commercial marketers are probably more sensitive to individual preferences than social marketers. (p. 67)

They conclude that the "hope" of protecting "social marketers from hubris and to encourage vigilance against inadvertent engagement in unethical behaviour" (Holden & Cox, 2011, p. 71). This is a conclusion worth spreading beyond social marketing and a literature of value to PR.

Finally, as social marketing strives to resist absorption by commercial marketing, so too, we argue, should activist, community, nonprofit and other prosocial PR resist the pull – perhaps by developing their identity as social PR – to be implicitly or explicitly under the banner of corporate PR. By standing apart from corporate PR and commercial marketing, yet standing together in the search for soul, both fields can achieve more in terms of employment and soul and access better opportunities than standing alone.

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